2014 BRITISH COLUMBIA INTERNATIONAL EDUCATION INTELLIGENCE REPORT

The Illuminate Consulting Group

June 2014

This report is being made available by the Illuminate Consulting Group (ICG) to international education stakeholders in British Columbia.

The report was released at the 2014 BCCIE Summer Seminar in Vancouver on 22 June 2014.

Electronic copies of the report are available through BCCIE and ICG under www.illuminategroup.com.

IMPRINT

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INTRODUCTION

ICG is pleased to share the *2014 British Columbia International Education Intelligence Report* with education providers, associations, government ministries, and other international education stakeholders in British Columbia. This report is available free of charge.

The report encompasses select research on and analysis of salient international education trends ICG has developed for its clients in British Columbia and beyond. Trends commented on stretch from global mobility trends to drivers influencing student decisions. The report closes with an outlook on the competitiveness of British Columbia and potential change dynamics unfolding between now and 2017.

ICG would like to extend its gratitude to the British Columbia Council of International Education (BCCIE), and specifically to its Executive Director, Dr. Randall Martin, as well as its staff members, for facilitating the release of this report at the 2014 BCCIE Summer Seminar in Vancouver.

We look forward to sharing more of our research at the 2014 BCCIE Summer Seminar and invite you to share this report with your colleagues.

Yours sincerely,

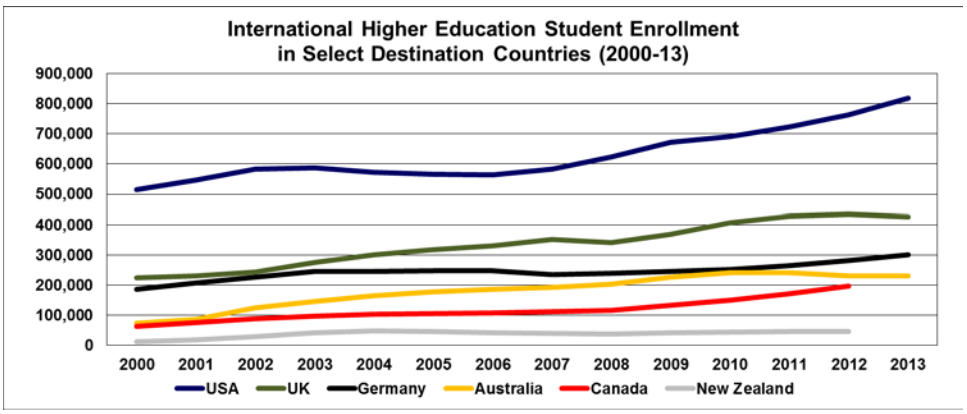
Dr. Daniel J. Guhr
Managing Director

GLOBAL STUDENT MOBILITY TRENDS

International Students Studying in Select Destination Countries

International student mobility has increased for multiple decades. In 2011, around 4.3 million students enrolled in tertiary education outside their home countries – up from 3.0 million in 2005 (OECD, 2013). In 2014, this figure should readily exceed 4.6 million (ICG e). Six leading destination countries are displayed in the graph below, with both France and China excluded owing to data definition and consistency issues. Both countries can be assumed to have enrolled more than 250,000 international students in 2013.

International Students in Select Destination Countries (2000-13)

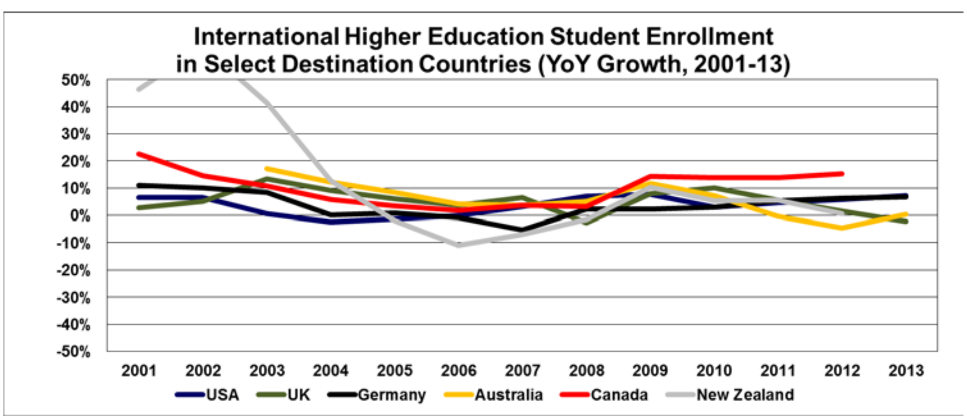


Notes: Australian methodology revised between 2001 and 2002. UK methodology revised between 2007 and 2008.
Source: AEI, CIC, DAAD-DZHW, HESA, IIE, NZ MoE.

The above graph highlights the leadership role of the US on the one hand, and the enrollment growth trajectories of the UK, Germany, Australia and Canada on the other hand. New Zealand remains an outlier with no growth over much of the last decade. Preliminary 2013 data for Canada indicates a catch up with Australia, underpinned by Canada's uniquely strong growth performance since 2008 as shown in the below graph.

International Students in Select Destination Countries (Year-over-Year Growth)

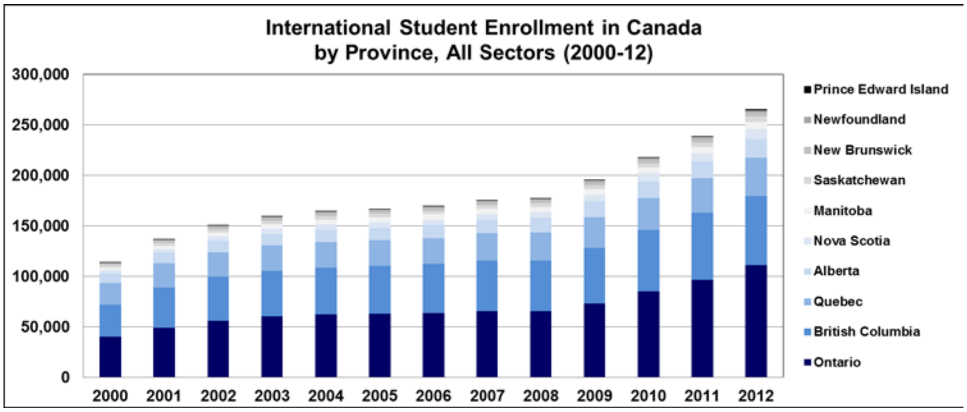
Notes: Australian methodology revised between 2001 and 2002. UK methodology revised between 2007 and 2008.
Source: AEI, CIC, DAAD-DZHW, HESA, IIE, NZ MoE.



International Students in Canada[1]

In 2012, more than 265,000 long-term international students (i.e., enrolled in programs lasting at least six months) studied in Canada. More than a quarter of these students (68,317) pursued their education at institutions in BC, which hosts the second-largest international student population among Canada's provinces and territories, second only to Ontario.

International Student Enrollment in Canada by Province, All Sectors (2000-12)

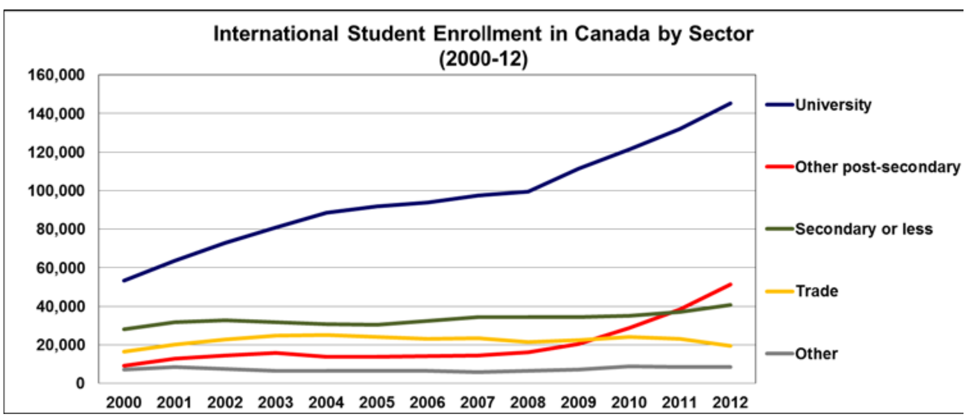


Notes: Northwest Territories, Nunavut, and Yukon not displayed.
Source: CIC.

A large majority of long-term international students in Canada study at the university level. This group of students in Canadian universities grew by 46.1 percent between 2008 and 2012. Only the "other post-secondary" sector (i.e., non-university/trade studies in colleges, private training, and language institutions) experienced more rapid enrollment increases – more than doubling over the same period.

International Student Enrollment in Canada by Sector (2000-12)

Notes: Sectors based on levels of study as defined by CIC.
Source: CIC.



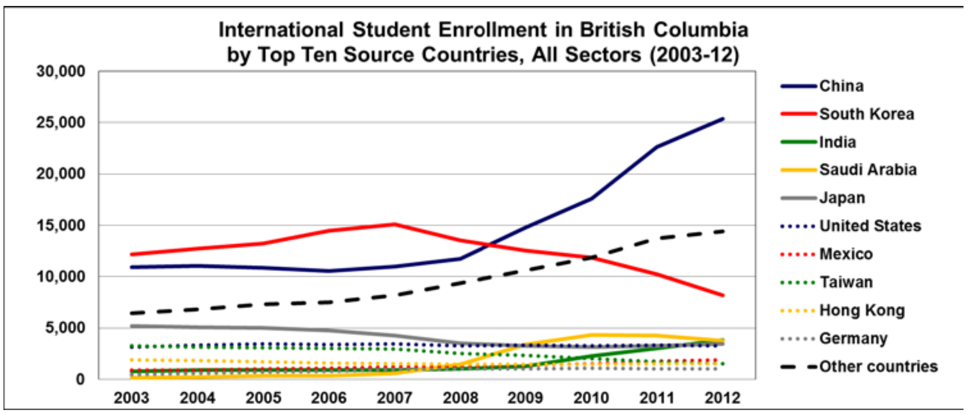
1 The following analysis uses data from Citizenship and Immigration Canada (CIC) on "foreign students". These data include only temporary residents who have been issued a study permit (required for any program of study of six months or more) and are in Canada principally to study.

INTERNATIONAL STUDENTS IN BRITISH COLUMBIA

Overview

The number of long-term international students studying in BC increased by 50.7 percent between 2003 and 2012, from 45,332 to 68,317. Increasing enrollment of Chinese students fuelled much of this growth. Correspondingly, the Chinese share of international students in BC rose from 24.1 percent in 2003 to 37.1 percent in 2012. Only student enrollments from Saudi Arabia and India grew more rapidly, although both started from relatively low levels in 2003.

International Students in British Columbia by Source Country (2003-12)

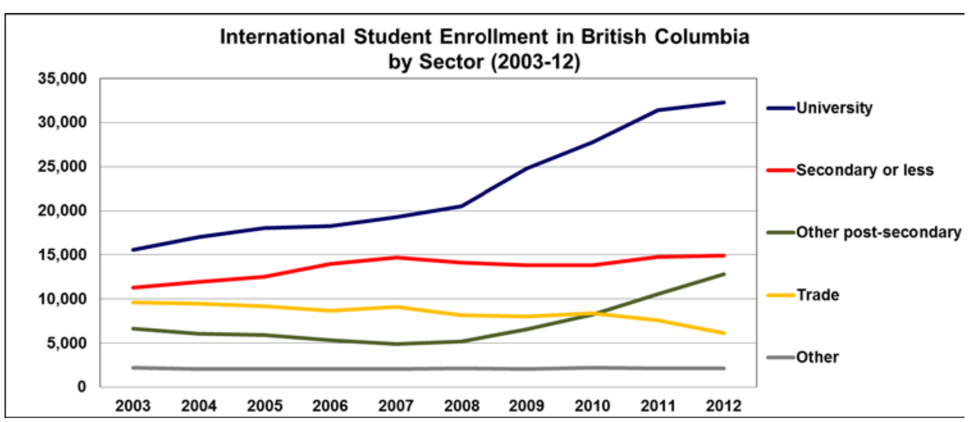


Source: CIC.

Similarly to other Canadian provinces/territories, the university sector accounts for the highest share of long-term international students in BC. However, BC's elementary and secondary schools (K-12) attract an outsized number of international students. More than a third of long-term international students in Canada at the "secondary or less" level studied in BC in 2012. The Province's college and institute sector also experienced rapid international enrollment growth in recent years.

International Student Enrollment in British Columbia by Sector (2003-12)

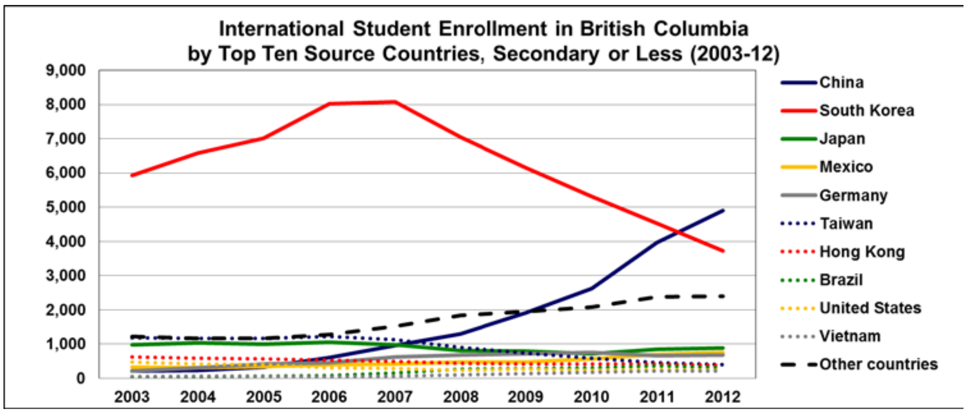
Notes: Sectors based on levels of study as defined by CIC.
Source: CIC.



K-12 Sector

The international recruitment performance of BC's K-12 in recent years is largely driven by recruitment success in China. In particular, Chinese students are filling the gap created by rapidly declining South Korean enrollments in this sector. However, many international students from BC's non-Asian leading source countries, such as Germany and Brazil, are concentrated in the K-12 sector. K-12 schools in BC operate as a potent pathway for international students who may continue to post-secondary study in the province. Diversification in this sector is therefore particularly valuable.

International Students in British Columbia, Secondary or Less (2003-12)

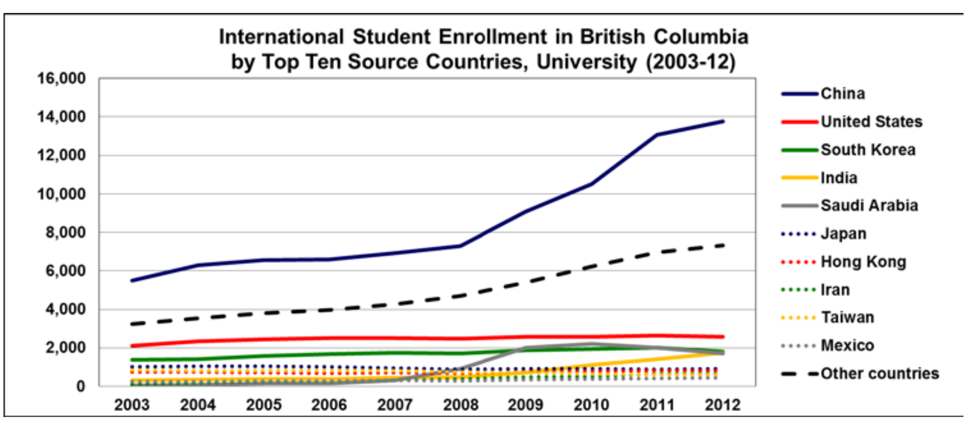


Source: CIC.

Universities Sector

At 32,283 students, BC's university sector accounts for nearly half of all long-term international students in the Province. Although China leads enrollments in BC universities by far, many international university students also hail from the United States. The only other country to have ever accounted for more than 2,000 students in BC universities in any given year during the period displayed is Saudi Arabia, between 2009 and 2011.

International Students in British Columbia, University (2003-12)

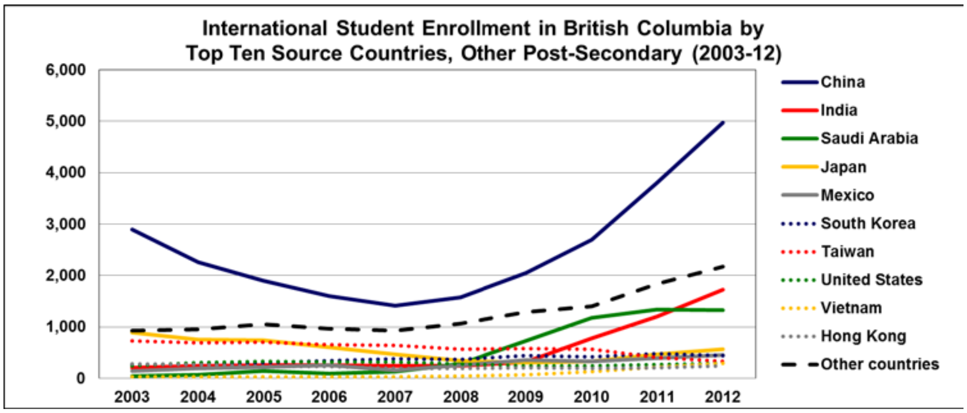


Source: CIC.

Colleges and Institutes Sector

BC's colleges and institutes are represented by CIC data on students in the "other post-secondary" category. Next to China, India is a key source country for BC colleges and institutes. These institutions offer a broad array of options to international students, including stand-alone diploma and degree programs, the opportunity to transfer into BC universities under the BC Transfer Guide, as well as an increasing number of post-graduate diploma/certificate programs.

International Students in British Columbia, Other Post-Secondary (2003-12)



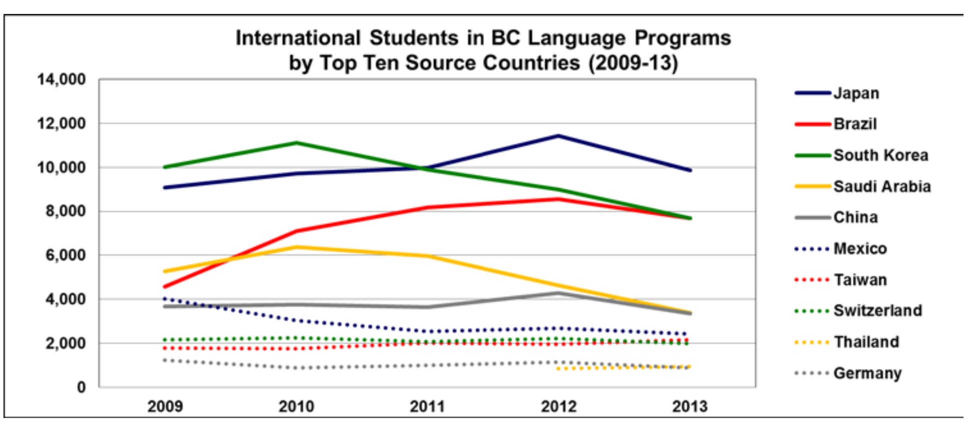
Notes: CIC data does not disaggregate College-level students. These are included in the "Other post-secondary" category.
Source: CIC.

Language Schools Sector

While CIC data includes international students in language programs of longer than six months (i.e., needing study permits), many of these students pursue short-term programs in Canada to improve their English or French language skills. According to Languages Canada, more than 50,000 international students study in language programs at its member institutions in BC. These students often continue to further post-secondary study in the Province, and many hail from key source countries.

International Students in BC Language Programs (2009-13)

Notes: Includes only students in Languages Canada member programs. Decrease in 2013 partially owing to a change in membership.
Source: Languages Canada.



PERSPECTIVES ON BRITISH COLUMBIA'S RECRUITING MARKETS

Overview

The recruitment of international students into British Columbia does not occur in a vacuum. BC's leading international student source markets also send many students to other major education destinations. This section compares international higher education student enrollment from China, India, the United States, South Korea, and Japan in BC, Ontario, Australia, Germany, New Zealand, the United States, and the UK.

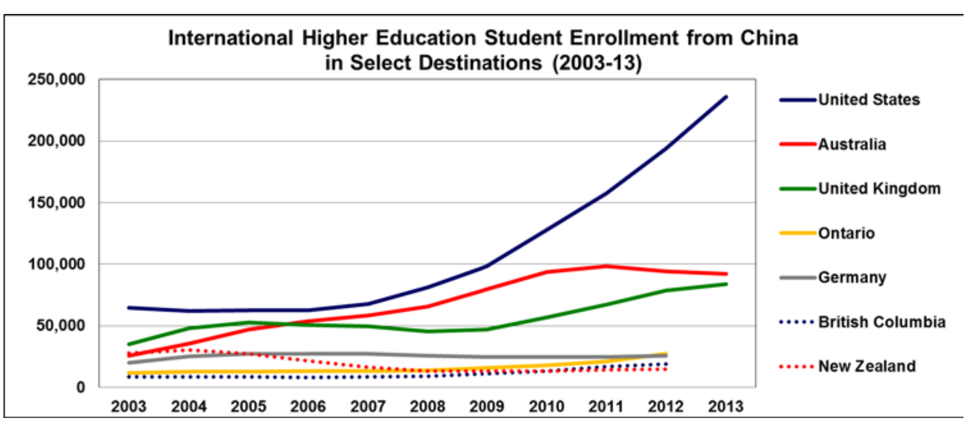
These comparisons are provided to highlight BC's competitive position in some of its key recruitment markets. Additionally, they serve to offer a broader view of trends in student flows from these source countries.

Note that for the purpose of these comparisons, international higher education students in Canada (BC and Ontario) are taken as the sum of students in the "university" and "other post-secondary" levels of study in CIC data. This figure is used for better comparability with international student data from other leading destination countries. Several of these countries do not consistently publish data on international students at primary and/or secondary education levels, therefore these cannot be compared.

China

In 2013, China's Ministry of Education reported that 399,600 Chinese students studied abroad in 2012, of whom 380,000 were self-funded. China sent the largest number of international students to each of the countries covered below except in the case of Germany. The US witnessed the most significant increase in Chinese enrollment since 2006. Growth from China slowed or decreased in Australia and the UK in recent years. New Zealand experienced early success in recruiting Chinese students, but failed to maintain this enrollment and now hosts fewer Chinese students than it did in 2004.

International Higher Education Student Enrollment from China (2003-13)

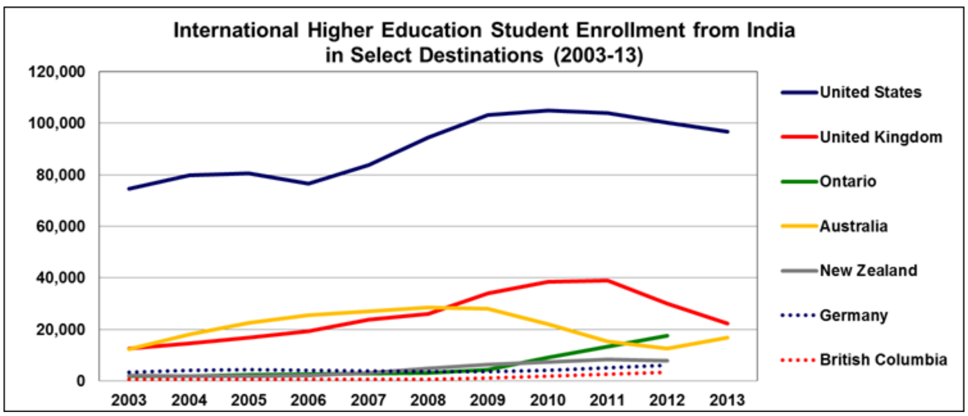


Notes: Higher education for Canada taken as the sum of "University" and "Other post-secondary" students in CIC data.
Source: AEI, CIC, DAAD-DZHW, HESA, IIE, NZ MoE.

India

Indian students are known to be economically rational and typically interested in work and immigration opportunities. For example, the number of Indian students in the UK halved from 2011 and 2013 following the effective closure of the post-study work visa route. Conversely, the number of Indian students in Ontario nearly doubled between 2010 and 2012 largely due to the introduction of the Student Partners Program by CIC to facilitate visa processing for applicants to Canadian colleges. This greatly benefited colleges in the Greater Toronto Area, which already held a strong attraction to Indian students due to the presence of respective diaspora communities.

International Higher Education Student Enrollment from India (2003-13)



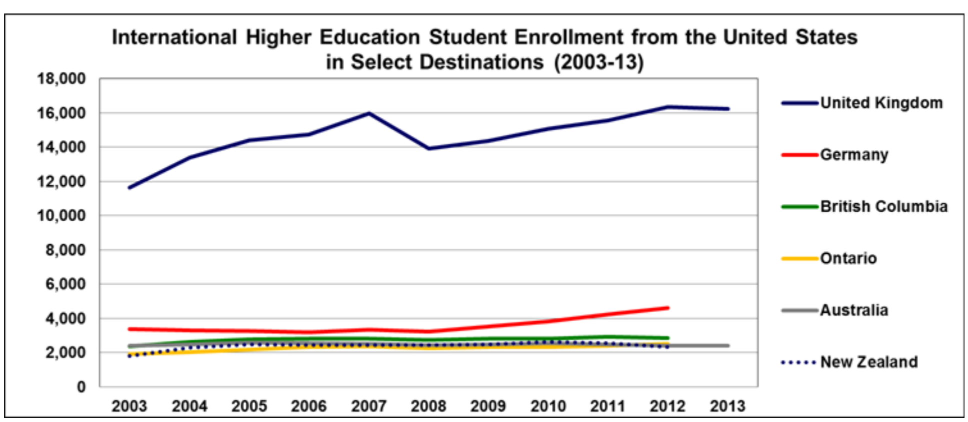
Notes: Higher education for Canada taken as the sum of "University" and "Other post-secondary" students in CIC data. Source: AEI, CIC, DAAD-DZHW, HESA, IIE, NZ MoE.

United States

The United Kingdom continues to be the most popular international study destination for American students by far. Germany has experienced increasing US enrollment in recent years, partially owing to its no-tuition fees value proposition. BC, substantially driven by UBC, is quite successful at recruiting students from the US. In 2012, more students from the US studied in BC than in Australia or New Zealand.

International Higher Education Student Enrollment from the US (2003-13)

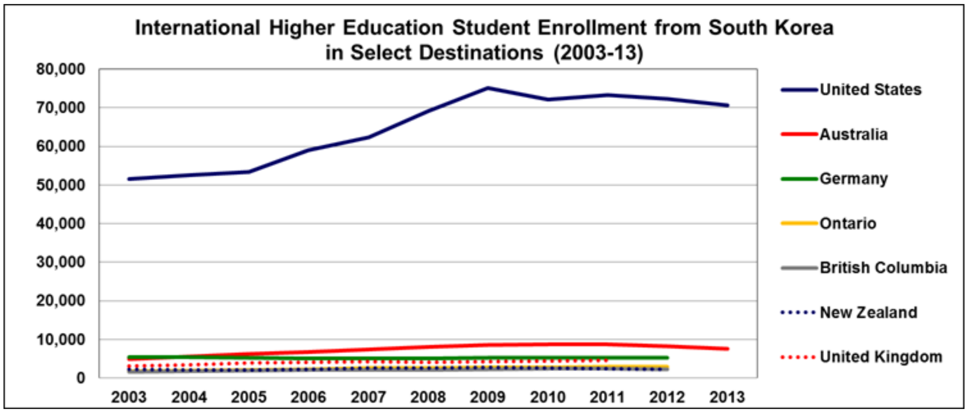
Notes: Higher education for Canada taken as the sum of "University" and "Other post-secondary" students in CIC data. Source: AEI, CIC, DAAD-DZHW, HESA, IIE, NZ MoE.



South Korea

Demographic pressures are resulting in decreasing South Korean enrollments in most leading international student destination countries. Among the countries discussed below, only the US is maintaining a sizeable contingent of students from South Korea. None of the other jurisdictions displayed enrolled more than 10,000 South Korean students in higher education at any point since 2003. It is suggested that South Korea should be treated as a maintenance market.

International Higher Education Student Enrollment from South Korea (2003-13)



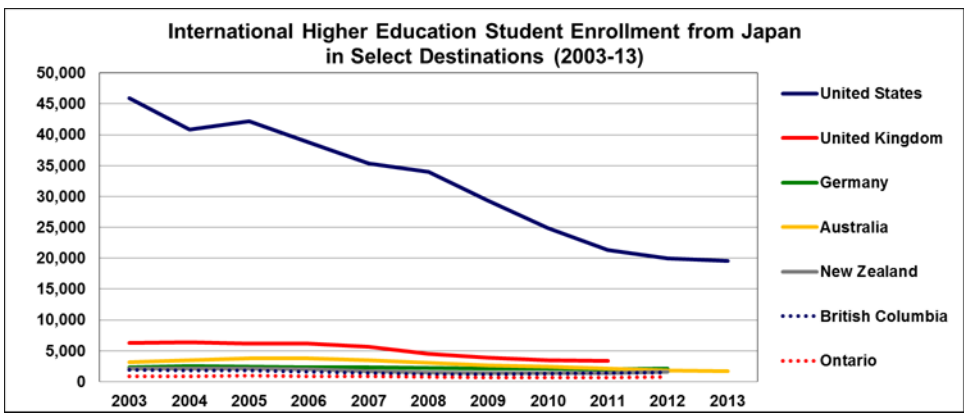
Notes: Higher education for Canada taken as the sum of "University" and "Other post-secondary" students in CIC data.
Source: AEI, CIC, DAAD-DZHW, HESA, IIE, NZ MoE.

Japan

Similarly to South Korea, recent years characterized Japan as an international student sending market in steep decline. For example, the US hosted less than half as many Japanese students in 2013 as it did in 2003. However, the Japanese government is aiming to double the number of its students abroad from less than 60,000 in 2011 to 120,000 in 2020. Already, Germany, New Zealand, and Canada experienced increasing Japanese enrollment from 2011 to 2012. BC institutions may benefit from maintaining or bolstering existing recruitment relationships in Japan.

International Higher Education Student Enrollment from Japan (2003-13)

Notes: Higher education for Canada taken as the sum of "University" and "Other post-secondary" students in CIC data.
Source: AEI, CIC, DAAD-DZHW, HESA, IIE, NZ MoE.



STUDENT DECISION DRIVERS: COST

Overview

It is estimated that international higher education students around the world spend more than CAD 50 billion on the cost of tuition fees alone. The cost for these students to pursue an international education has increased notably over the last two decades. At the upper range, an international student may be required to invest more than CAD 300,000 in fees and living expenses to acquire an undergraduate degree (for example, from a private US university).

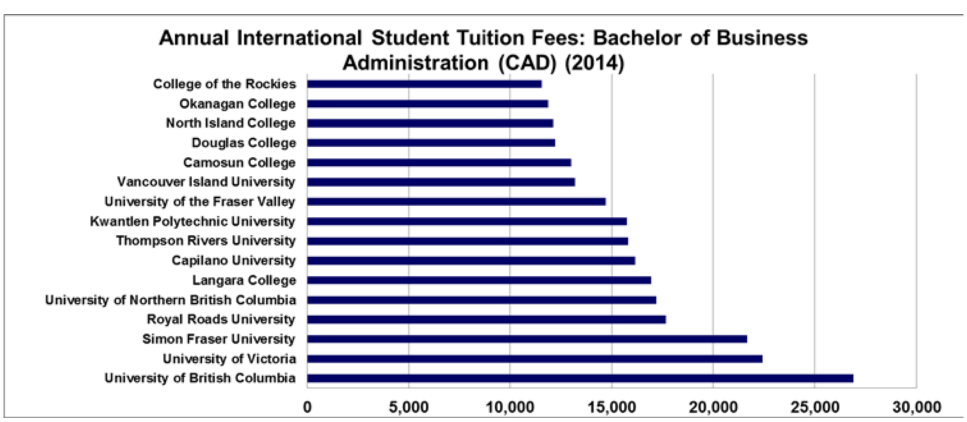
The continued popularity of perceived "high cost" destinations such as the United States and Australia among international students indicate that cost is not a sole decision driver for students. International students can be willing to endure cost if they believe an institution is providing significant value in return. In the increasingly competitive student recruitment landscape, institutions must thus be mindful of their cost position relative to their peers/competitors and to their respective value proposition.

This section provides perspectives on the cost for international students to study in British Columbia. The below discussion is intended to assist BC post-secondary institutions with placing themselves based on their individual cost positions.

International Student Tuition Fees at BC Post-Secondary Institutions

The graph below compares annual international student tuition fees in 2014 for Bachelor of Business Administration (BBA) programs at BC colleges and universities. The BBA is used as an example due to its wide availability and popularity among international students. Annual program fees at institutions offering the program in BC range widely, from less than CAD 12,000 to nearly CAD 27,000. Colleges generally charge less than universities – the average annual fee at displayed colleges is CAD 12,964, compared to an average annual fee of CAD 18,147 at universities.

International Tuition Fees: Bachelor of Business Administration (CAD) (2014)



Source: Institutions.

Perspectives from ICG's International Tuition-based Competition Database

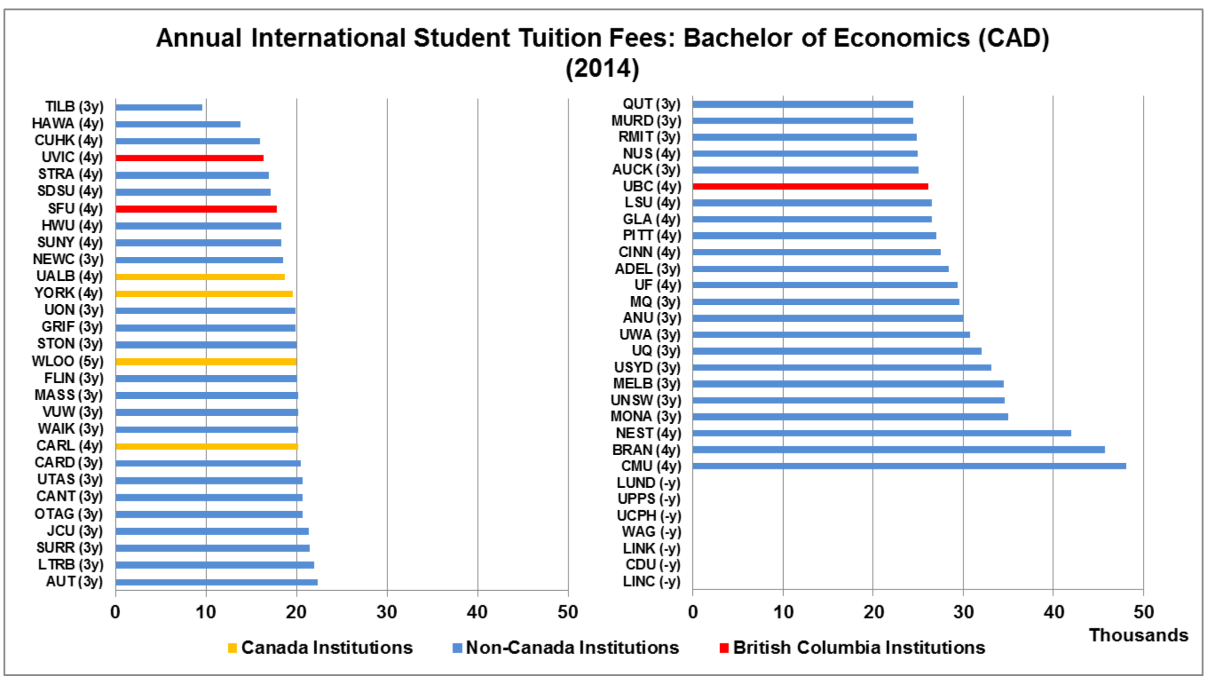
The following analysis is based on benchmarking data from ICG's International Tuition-based Competition Database (ITBCD). ITBCD contains over 9,000 individually benchmarked programs across 90 institutions, including internationally-ranked research universities (the majority of programs), art and design institutions (more than 600 programs), and a selection of college-level institutions.

The analysis presented herein focuses on benchmarking of costs at 60 ranked research universities across ten countries (Australia, Canada, Denmark, Hong Kong, the Netherlands, New Zealand, Singapore, Sweden, the United Kingdom, and the United States).

The graph hereunder presents annual international student tuition fees in 2014 for a Bachelor of Economics degree program at benchmarked universities. Among the three BC universities covered – Simon Fraser University (SFU), the University of British Columbia (UBC), and the University of Victoria (UVic), cost variation is evident. SFU and UVic charge near the lowest fees in the benchmarking pool on an annual basis.

In comparison, UBC is among the second highest quartile based on its annual fees, and charges the most of the seven covered Canadian universities. Most of the universities charging higher fees than UBC are private US universities or Australian universities belonging to the Group of Eight.

Annual International Tuition Fees: Bachelor of Economics (CAD) (2014)



Source: ICG ITBCD.

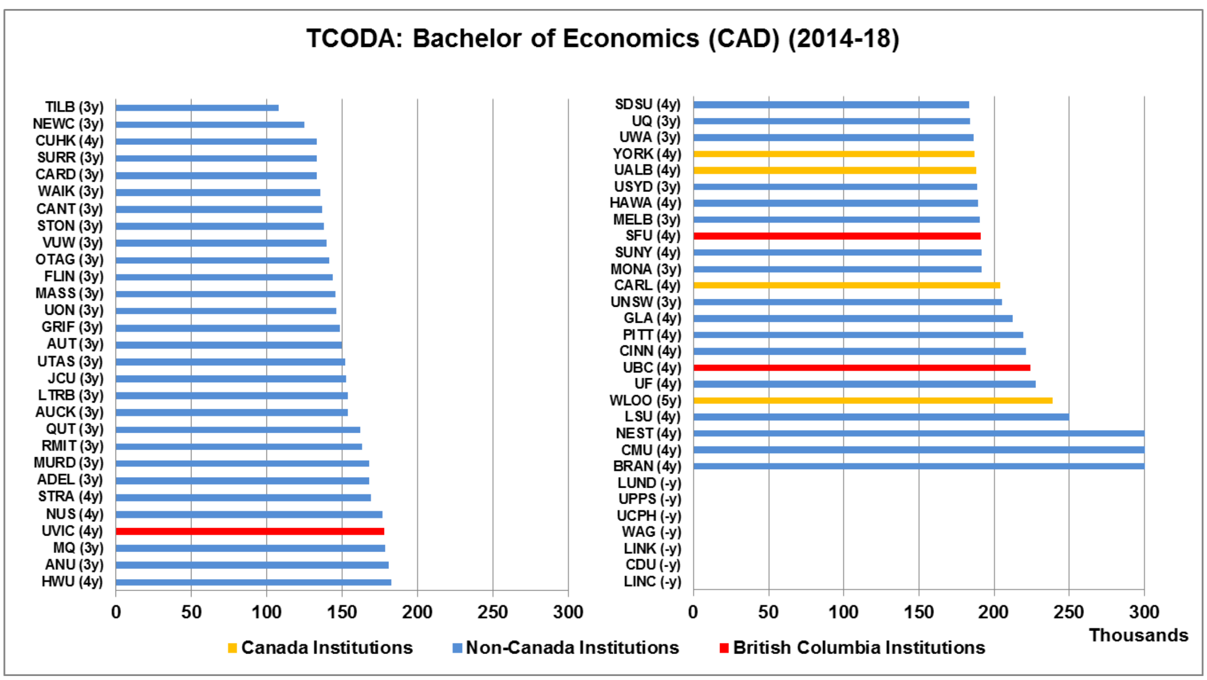
It is important to recognize that while annual tuition fees are a simple indicator of cost, they do not reflect the total investment made by students in an international education experience. In order to understand the full cost that international students have to cover in order to complete a particular degree program, ICG developed the concept of Total Cost of Degree Acquisition (TCODA).

TCODA combines tuition fees, additional fees (e.g., student service fees, technology fees, etc.), and estimated cost of living over the duration of a degree program into one metric of cost. Past increase and inflation rates, combined with institutional information on future fees increases, are used to generate fees and cost of living levels for future years. Using forward-looking modeling ICG can model TCODA for an international student over the duration of a given program.

The following graph displays the TCODA for international students to complete a Bachelor of Economics degree beginning in 2014 at benchmarked universities. On an annual fees basis, BC universities appeared fairly competitive within the benchmarking pool. The projected TCODA at these universities is less competitive – for example, UBC is the seventh highest among the benchmarked universities.

The high TCODA at benchmarked BC universities can be largely attributed to two factors: The duration of undergraduate programs at Canadian universities (four years compared to three at Australian, New Zealand, and UK universities), which incurs additional cost to students; and for UBC and SFU, the cost of living in Vancouver (and adjacent Burnaby).

Total Cost of Degree Acquisition: Bachelor of Economics (CAD) (2014)



Source: ICG ITBCD.

STUDENT DECISION DRIVERS: RANKING

Overview

While national rankings are well established in many countries, global rankings are just one decade old. The Academic Ranking of World Universities (ARWU, also known as the Shanghai Ranking) was the first of these rankings to be published, starting in 2003. Since then, the QS World University Rankings and Times Higher Education (THE) World University Rankings have been launched. The analysis presented in this section focuses on the aforementioned three rankings based on their international prominence.

International students and relevant decision-makers and influences such as parents, agents, or scholarship agencies and often turn to these rankings as measures of the reputation and quality of a university when making study destination decisions. While debates continue surrounding the methodologies and objectives of these rankings (e.g., emphasis on research universities or reliance on survey-based data), they continue to impact international student perceptions of a destination and thus require consideration.

British Columbia Universities in the Rankings

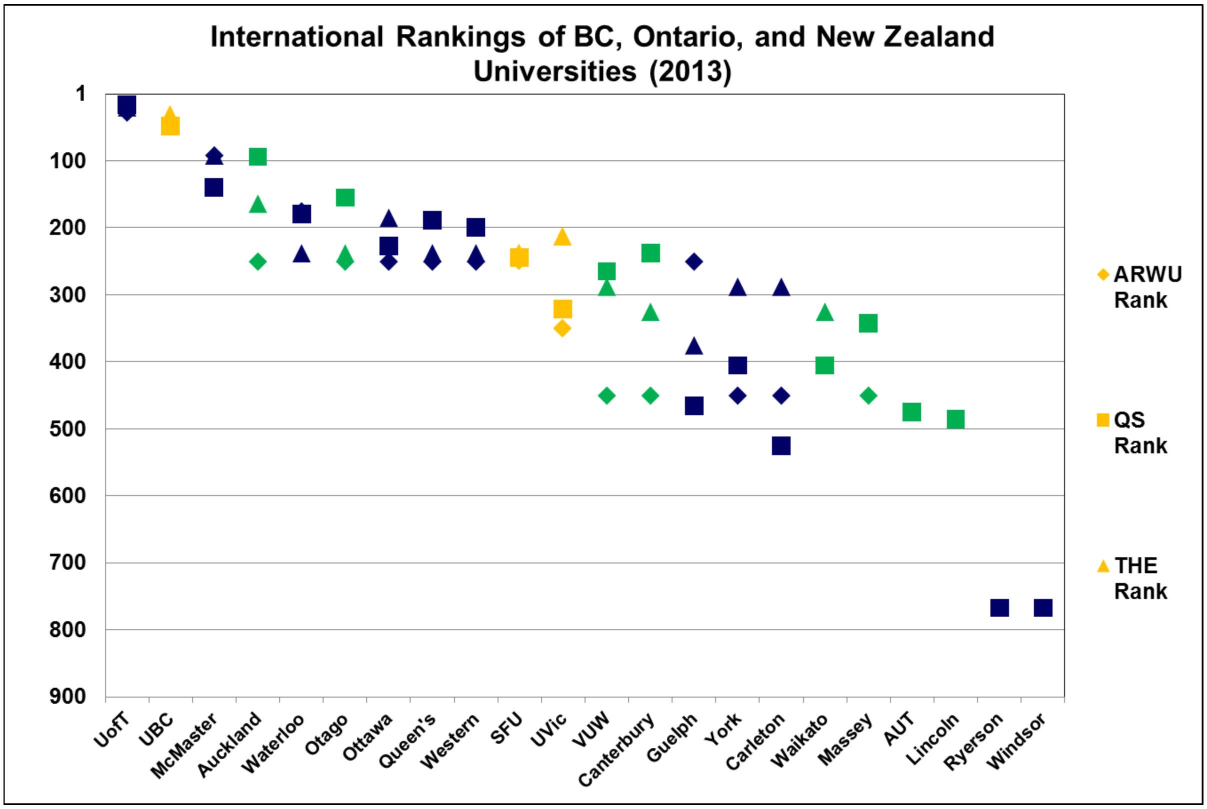
The graph overleaf compares the rankings position of BC, Ontario, and New Zealand universities included in at least one of the three major rankings: ARWU, QS, and THE. Ontario is presented as BC's key competitor jurisdiction between Canada – the majority of international university students in Canada study in one of the two provinces. New Zealand is utilized as a comparison jurisdiction for BC based on its population size and international student enrollment level.

New Zealand is notable as a jurisdiction in that all eight of its universities appear in the Top 500 universities in at least one of the three major rankings. Half of Ontario's public universities (11 out of 22) appear in at least one of the rankings, of which six consistently ranked in the Top 300 in 2013. BC is positioned somewhat less favorably in this comparison, with only three of its 11 public universities appearing in the rankings.

The BC higher education landscape operates with what may be described as a gap in the positioning of its universities. BC's ranked, high-performing research universities are highly competitive, with UBC in particular positioned as a Canadian flagship (among the University of Toronto and McGill University) with a distinct international reputation.

Although BC's teaching-focused universities recruit internationally, some students may overlook these universities (and may overlook BC as a whole) since they do not appear in international rankings. This is particularly challenging for those institutions which were only classified as universities as of 2008 – even among students in BC, these are often perceived as college-level institutions.

International Rankings of BC, Ontario, and New Zealand Universities (2013)



Notes: BC universities indicated in orange, Ontario universities indicated in dark blue, New Zealand universities indicated in green. Rankings in ranges (e.g., 201-300) represented by midpoints.
Source: ARWU, QS, THE.

British Columbia Universities in Subject Rankings

Each of the three major international university rankings also publishes sub-rankings of top universities based on academic and research performance in specific fields and subjects. The ARWU ranks the Top 200 universities in five subject areas, the QS ranks the Top 200 in 30 subject areas[2], and the THE ranks the Top 100 in six subject areas. The following table provides an overview of the ranked BC universities in these subject rankings.

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[2] English Language & Literature, History, Linguistics, Modern Languages, Philosophy, Computer Science & Information Systems, Engineering – Chemical, Engineering – Civil and Structural, Engineering – Electrical & Electronic, Engineering – Mechanical, Aeronautical & Manufacturing, Agriculture & Forestry, Biological Sciences, Medicine, Pharmacy & Pharmacology, Psychology, Chemistry, Earth & Marine Sciences, Environmental Sciences, Geography, Materials Science, Mathematics, Physics & Astronomy, Accounting & Finance, Communication & Media Studies, Economics & Econometrics, Education, Law, Politics & International Studies, Sociology, and Statistics & Operational Research.

BC Universities in International University Subject Rankings (2013)

Ranking	Subject	UBC	SFU	UVic
ARWU	Mathematics	76-100	101-150	151-200
	Physics	51-75	-	51-75
	Chemistry	101-150	-	-
	Computer Science	27	101-150	-
	Economics	33	101-150	-
THE	Arts and Humanities	34	-	-
	Clinical, Pre-clinical and Health	30	-	-
	Engineering and Technology	48	-	-
	Life Sciences	23	-	-
	Physical Sciences	26	-	90
	Social Sciences	20	-	-

Source: ARWU, THE.

UBC is included among the Top 100 in 28 of the 30 subject rankings published by QS (excluding Philosophy and Communication & Media Studies). SFU appears in the Top 150 universities in the QS subject ranking for Communication & Media Studies. UVic does not rank among the Top 200 in any of the QS subject rankings.

STUDENT DECISION DRIVERS: SOCIAL MEDIA PRESENCE

Overview

Online engagement is increasingly important for education institutions seeking to reach prospective international students located around the world. This social media footprint analysis focuses on the presence of BC education institutions on Facebook, LinkedIn, Twitter, and YouTube. These four platforms were chosen because they offer a combination of reach (measured in users or traffic) and relevancy (as measured in the prevalence of target groups education providers aim to reach).

All four platforms, at varying levels, are useful for BC institutions to engage on from a marketing, outreach, alumni relations, employer relations, and competitive intelligence perspective. The most important aspect of these platforms from a marketing and recruitment perspective is their ability to reach thousands of potentially interested students by virtue of their respective communication and network dynamics.

The following analysis covers all BC public universities, colleges and institutes. Select international peers are included for comparative perspective, including Fachhochschule Frankfurt am Main (FH Frankfurt, Germany), the Northern Melbourne Institute of TAFE (NMIT, Australia), Macquarie University (Australia), Miami Dade College (United States), the University of California, Davis (United States), and the University of Edinburgh (United Kingdom).

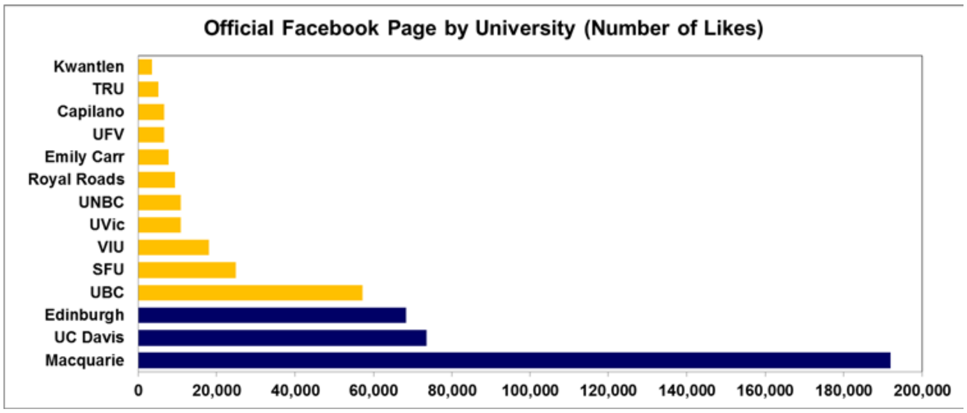
While the social media metrics presented in this analysis are partially a reflection of institutional size and enrollment levels, they also provide insight into the relative brand position of institutions. For example, more than 3.3 million Facebook users “Like” the Harvard University Facebook page despite the University only enrolling about 21,000 students.

Note that the values for the specific metrics for each institutional presence (number of Likes on Facebook, number of Twitter followers, etc.) change on a daily basis. The objective of indicating these values is thus to provide a snapshot of the relative presence of each institution.

British Columbia Institutions on Facebook

Relative to global competitors, BC universities enjoy a relatively small social media footprint on Facebook. UBC is the only BC university whose official Facebook page is "Liked" by more than 25,000 users. Among BC universities, VIU is fairly successful at attracting users to its official Facebook page, with a footprint comparable to or exceeding larger universities. Both SFU's and UVic's footprints on Facebook are comparatively small.

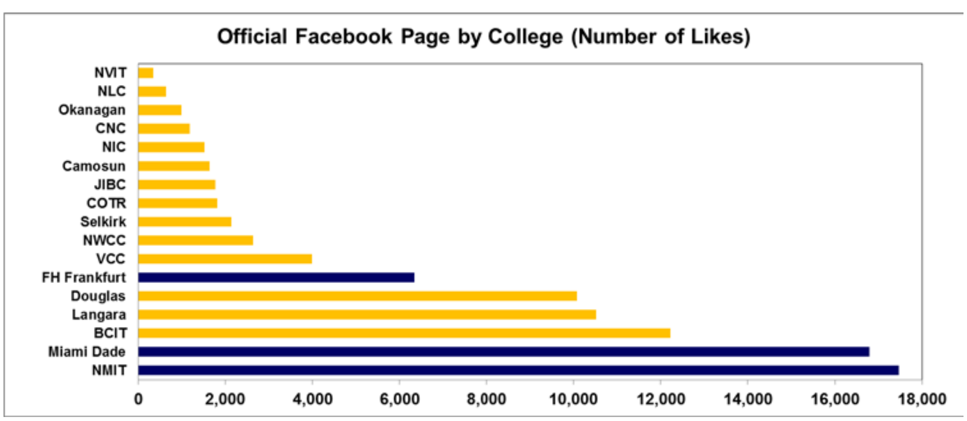
Official Facebook Page by University (Number of Likes)



Source: Facebook (June 2014).

The number of Likes for BC college presences on Facebook largely reflect their overall size. BCIT, Langara, and Douglas each garner more than 10,000 Likes for their official Facebook pages. The size of these profiles is comparable to international peers and indicates the impact of institutional branding efforts. NWCC is notable for achieving a sizable profile relative to its enrollment level among BC colleges.

Official Facebook Page by College (Number of Likes)

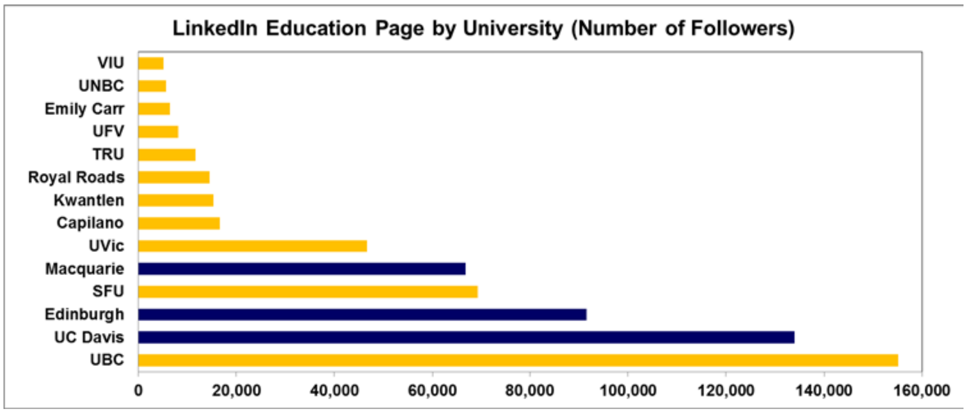


Source: Facebook (June 2014).

British Columbia Institutions on LinkedIn

Institutions often see LinkedIn as a platform primarily for alumni networking. However, the introduction of LinkedIn "University Pages" in August 2013 has enhanced the ability of institutions to use LinkedIn to reach prospective students and highlight the outcomes of graduates. UBC's global reputation and reach is evidenced by its strong LinkedIn following of more than 155,000 users. BC's teaching universities have yet to fully leverage LinkedIn to demonstrate alumni outcomes.

LinkedIn Education Page by University (Number of Followers)



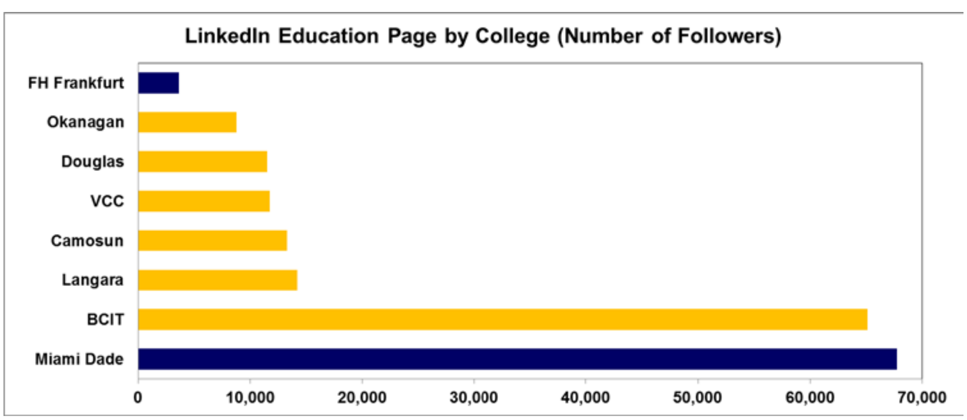
Source: LinkedIn (June 2014).

The roll-out of LinkedIn University Pages is on-going and has not yet been granted to all colleges. Among BC colleges possessing LinkedIn University Pages, BCIT achieves the greatest reach by far, with more than 65,000 followers. No other BC college LinkedIn page achieves a following of more than 15,000.

One of the challenges for BC colleges engaging with alumni on LinkedIn is that many of their students transfer to universities and accordingly do not identify themselves as college alumni. Colleges may benefit from enhanced efforts to reach these students and encourage maintaining connections through participation in LinkedIn networks.

LinkedIn Education Page by College (Number of Followers)

Source: LinkedIn (June 2014).

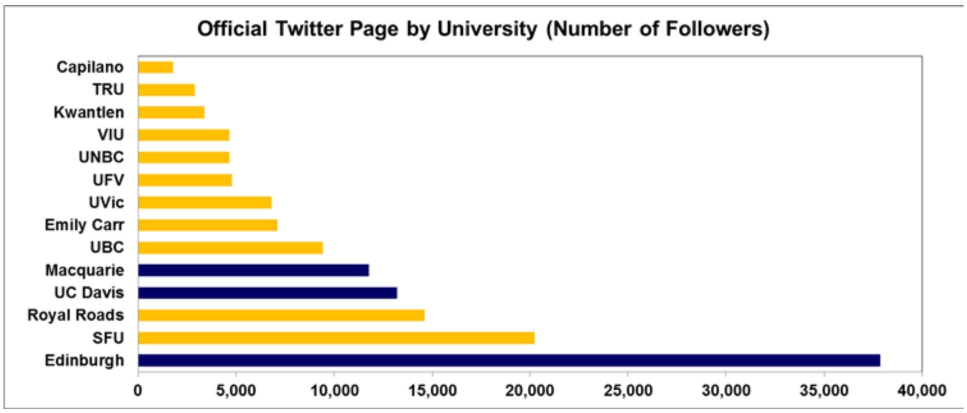


British Columbia Institutions on Twitter

To a great extent, Facebook and LinkedIn are affiliation-driven platforms for education institutions (i.e., students/graduates will Like or follow a page to indicate their connection to the institution). Twitter operates as a more content-driven platform: Twitter users largely draw followers based providing informative, entertaining, or engaging tweets.

Universities such as SFU and Royal Roads achieve comparatively large Twitter followings based on frequent sharing of multimedia content (e.g., photos and videos) and interactions with students (e.g., re-tweets and replies). Notably, the UBC Twitter following is relatively small compared to its presence on other platforms, largely because its official institutional account is one of many operated by the University (e.g., including accounts for different audiences such as prospective students or Faculty-specific accounts).

Official Twitter Page by University (Number of Followers)

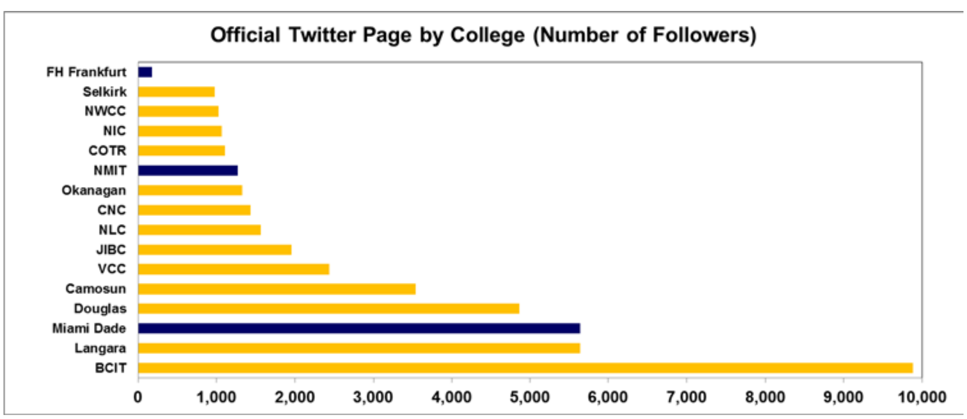


Source: Twitter (June 2014).

For BC colleges, size appears to be a key driver of Twitter followings. Unlike on other platforms, the presence of BC colleges on Twitter is often comparable to that of universities. This again reflects the different content landscape of Twitter.

Official Twitter Page by College (Number of Followers)

Source: Twitter (June 2014).

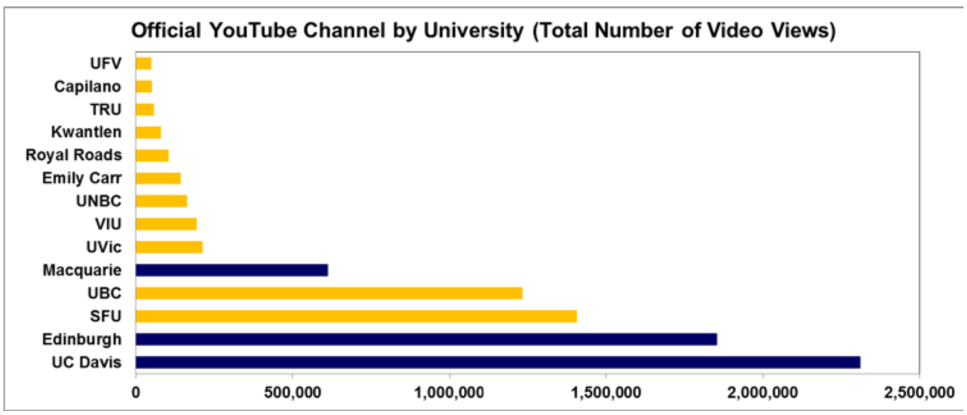


British Columbia Institutions on YouTube

Compared to platforms such as Facebook and LinkedIn, YouTube is not relationship-based. Traffic is driven by content, which can be made available for viewing by YouTube users who may not have an account or subscribe to the institutional channel. As such, an institution producing a small number of compelling videos can accomplish the same reach as one producing a high volume of videos.

For example, although UBC's YouTube channel hosts approximately 300 more videos than SFU's, on average SFU videos are viewed more frequently – resulting in the higher view count displayed below. Popular institutional videos range across a variety of content types, from well-produced promotional videos, to creative content videos, to videos of lectures delivered at an institution by prominent speakers.

Official YouTube Channel by University (Total Number of Video Views)

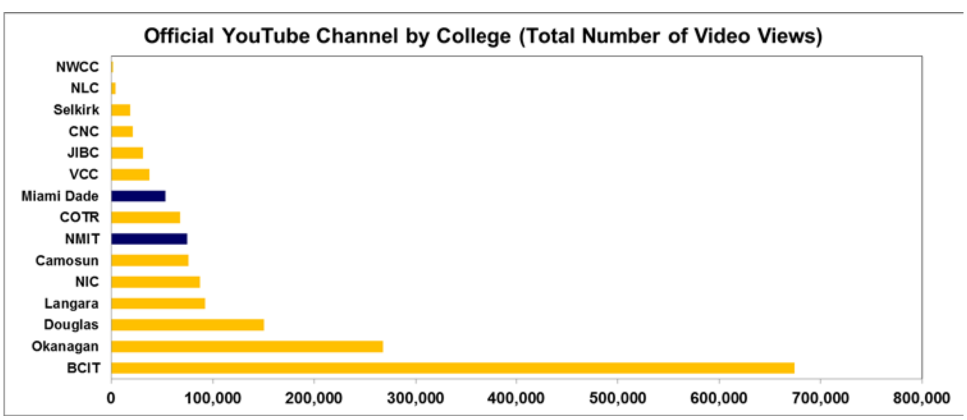


Source: YouTube (June 2014).

Okanagan College's YouTube presence demonstrates the value of compelling content over size. More than two-thirds of its YouTube views come from one video it posted in 2009: A video of the building of a world record-setting spaghetti bridge on campus at the Spaghetti Bridge World Championships.

Official YouTube Channel by College (Total Number of Video Views)

Source: YouTube (June 2014).



OUTLOOK: BRITISH COLUMBIA IN 2017

International education has without question been a success story for British Columbia. By 2013, total international student enrollments across all sectors exceeded 112,000, up from 94,000 in 2010 (Government of British Columbia). International students contributed CAD 2.3 billion to the Province, making international education a cornerstone of British Columbia's economy. Further growth is expected.

Yet recent year-over-year enrollment growth rates have begun to slow, indicating the slight need for caution going forward. British Columbia education providers have benefitted from multiple positive core competition factors, including high standards and quality programs, the attractiveness of BC (and Canada) as a study destination, and competitive tuition fees.

Yet some of these competition factors are coming under pressure. Vancouver in particular is competing as a study destination with a relatively high cost of living. Another factor deserving attention is the increasing over-reliance on China as a sending country that is heading towards a 40 percent (and growing) share of international student enrollments. A third consideration needs to be the strict maintenance of quality standards that are the backbone of BC's attractiveness to international students.

Niels Bohr remarked that “prediction is very difficult, especially about the future”. Offering predictions about the state of international education in BC by 2017 thus is fraught with risk, but this report nevertheless ventures to offer the following outlooks:

- BC is likely to see continued international student enrollment growth, but growth rates are more likely to decline than rise. There is a small but discernible risk of growth slowing notably for some institutions.
- The cost of living in Vancouver especially will put increasing pressure on institutions to mitigate costs or risk losing new student intake to lower cost destinations in Canada and elsewhere.
- The growing lack of diversification of the international student body is unlikely to be reversed in the short-term, resulting in a more pronounced need for re-balancing student portfolios in the mid-term future.
- Many BC universities will experience rising competitive pressures from Australian, UK, and increasingly US institutions in the areas of admissions, analytics, and alumni networks.
- The increasing utilization of better-integrated pathways will offset some of the above mentioned pressures. This also includes more general intra-provincial cooperation schemes, some of which are already emerging.

Addressing these challenges proactively and professionally is bound to assist BC and its education providers with defending its enviable position as a prime international student destination.

The Illuminate Consulting Group (ICG) is an international science, research, and academic strategy consulting firm advising the leadership of teaching and research institutions, foundations, governments, and public agencies on policy, development, and competition issues.